KETS Exchange Server 2003 E-mail Client Migration

Profile Recreation How To —

A Guide for Kentucky School Districts

April 26, 2006

Kentucky Department of Education

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Introduction

The purpose of this document is to assist districts in their Exchange 2003 client migration cleanup. As a district's user mailboxes are migrated to the new messaging platform, Exchange 2003, there are some processes that must take place in order for the clients to access their new mailboxes on the new Exchange server. Procedures detailed in this document are to assist district technicians, or possibly end users, in accomplishing the client transition.

The following instructions are segregated into the KETS supported client applications used to access e-mail. District CIOs/technicians may choose to edit and distribute this document to their end users to assist in the E-mail profile migration.

The focus of this document is to provide the technical steps necessary to perform certain operations. It does not cover in great detail what some of those operations are. An example is the steps to create Personal Folders. This document does not explain to the user the difference between an Outlook Personal Folder (PST) and folders that a user creates in Outlook under their mailbox, which some commonly call personal folders. It is the responsibility of the district, if this document is distributed to end users, to make such clarifications and modifications if necessary.

Note: All instructions covered are based upon KETS supported operating systems (Windows 2000 and above; Mac OS 9 and above) and KETS supported MAPI clients (Outlook 2000 SP2 and above; Outlook 2001 for the Mac and Entourage). Windows 2000 Professional was the operating system used for all Outlook for Windows testing. All scenarios assume only one profile per Outlook client. For assistance in creating multiple profiles on the same client, please contact the KETS Help Desk.

For more information about Outlook End-User training, see:

http://office.microsoft.com/en-us/training/CR061832721033.aspx.

Pre-Migration Information

Outlook Web Access (a.k.a. OWA, webmail)

There is a new URL (web address) to place in the browser or as a link off of the district's web page for access to the new (and much improved) Outlook Web Access. The old address use to be something like https://webmail.adair.k12.ky.us. The new address for Outlook Web Access is:

https://ketsmail.us.

This will be a common address for KETS, meaning it will work from within any district or from outside the KETS network. Districts should update any web page that contains the old OWA link and end users can either use the link from the page or enter this new link in their browser.

Outlook for all Windows versions (Intel)

Personal Folders

Before the migration, the district should identify any clients that are using Personal Folders (PSTs) and note the locations of these files. You will not be able to go back into the profile to find the location of the Personal Folder to point back to after the migration, as the Exchange 5.5 server will be rendered offline. A district could choose to do a search for *.PST to find the appropriate PST instead.

Profile Creation

All Windows Versions

The initial steps necessary to create/recreate a profile are the same for all KETS supported versions of the Outlook client.

Login to the client machine using the desired user's login account.

To set up the profile, either right-click the Outlook icon on the Desktop and choose Properties, or Click Start > Settings > Control Panel. If you cannot find your Outlook icon, contact your system administrator.

Double-click the Mail icon

The version specific steps beyond this point can be found in the appropriate sections below.

Outlook 2003

Profile Creation

If there is a profile already present, the following screen will be displayed. Click the *Show Profiles* button.

You will need to *Remove* the profile, then *Add* it back, pointing it to the new Exchange 2003 server.

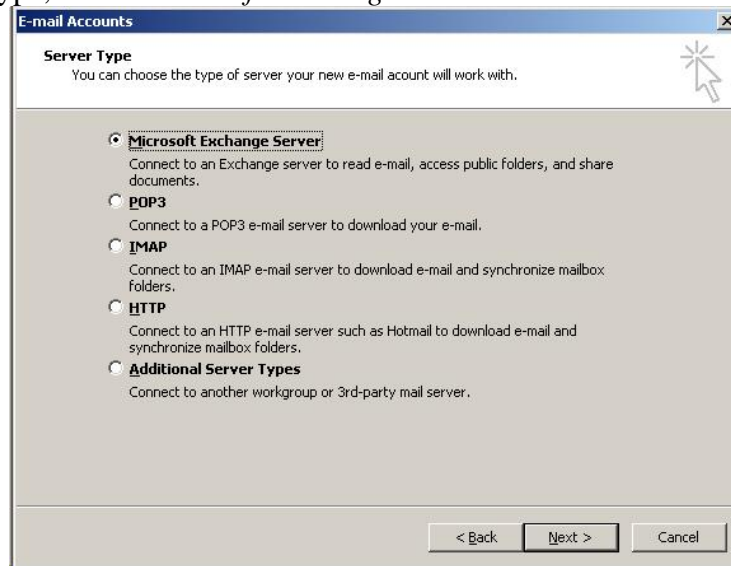On the Mail screen, click Add.
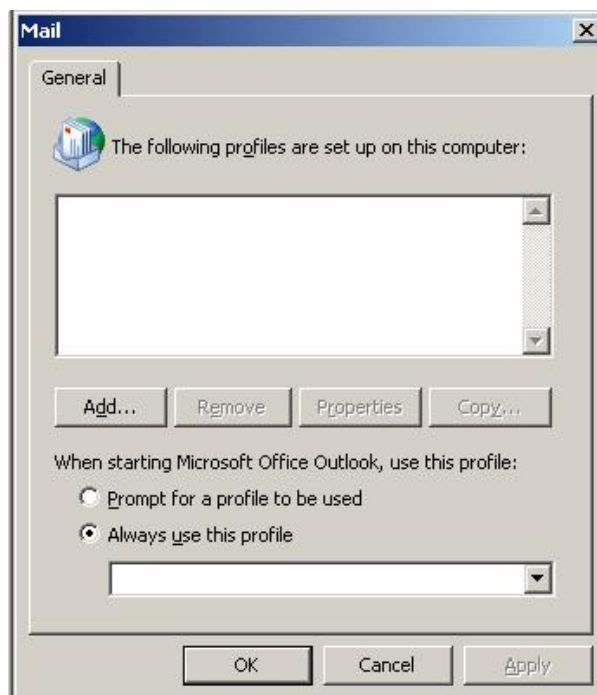
Type a profile name and click OK.

Under E-mail, select *Add a new e-mail account* and click Next.
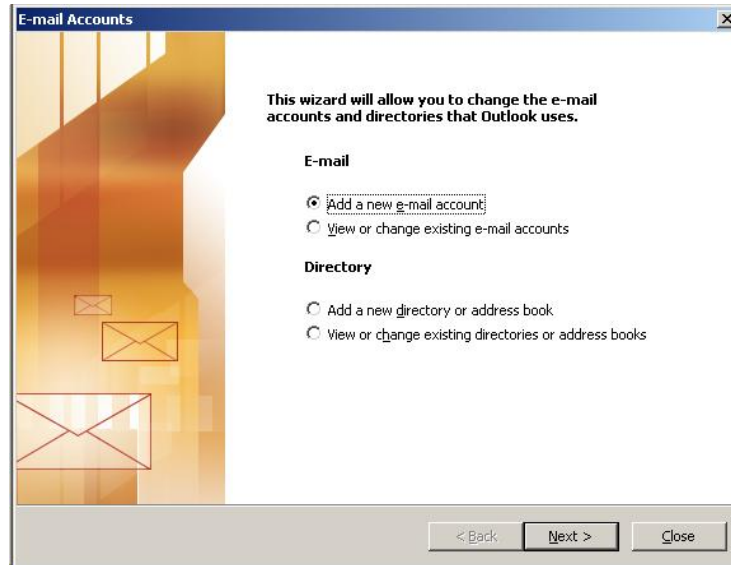
Under Server Type, select *Microsoft Exchange Server* and click Next.

Type the name of the district's Exchange 2003 Server in the *Microsoft Exchange Server* field. The naming standard is **ED*???*X1**, where *???* is the district number (Ex. ED501X1 for Pulaski County). A list of all district Exchange 2003 Server names can be found in Appendix A of this document. In the *User Name* field, type the Active Directory login of the person for whom you will be creating the profile.
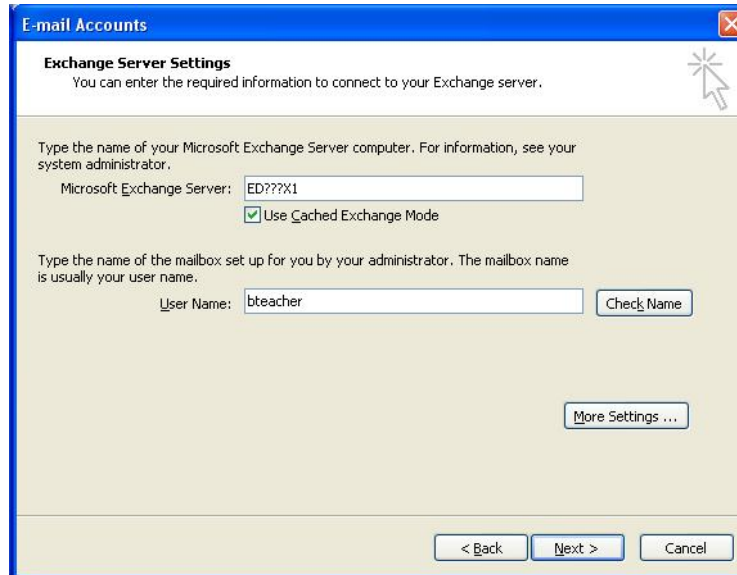
Once this is done, click Check Name. If there are multiple users with a similar user name, select the appropriate user from the pop up window (you can click the Properties button if you need to verify the correct user name) and click Okay. It should resolve the name of the server and user.   If so, it will underline both the Exchange Server name and the username.

Use Cached Exchange Mode is checked by default.   For more information on Cached Exchange Mode, reference Appendix B.

Note: It is imperative you understand the implications of Cached Exchange Mode before proceeding.

Click Next.

Click Finish.

The user should now be able to access their e-mail with this profile. If the user does not have a need for a Personal Folder, Click OK to close.


Otherwise ensure the profile is highlighted and click the Properties button to set up the Personal Folder options. Refer to the **Personal Folders in Outlook 2003** section below. If you have multiple profiles on this machine, and need further assistance, please contact the KETS Help Desk.

Personal Folders in Outlook 2003

To access or create a Personal Folder, click the Data Files button.
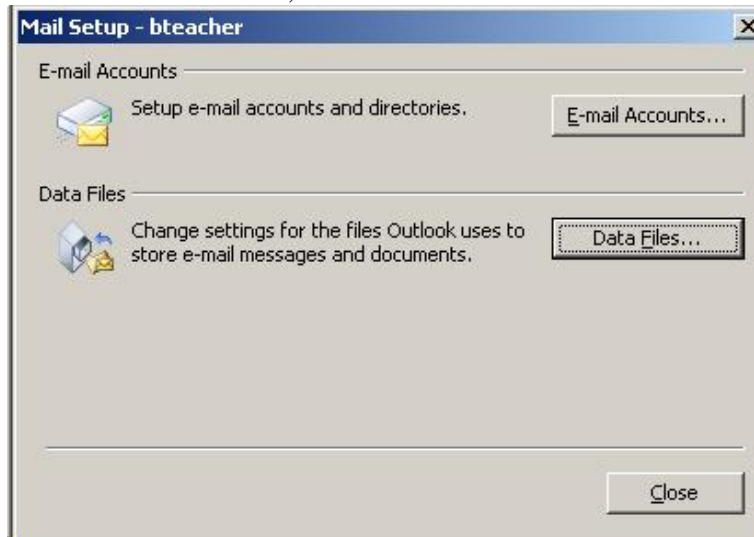

Click Add.
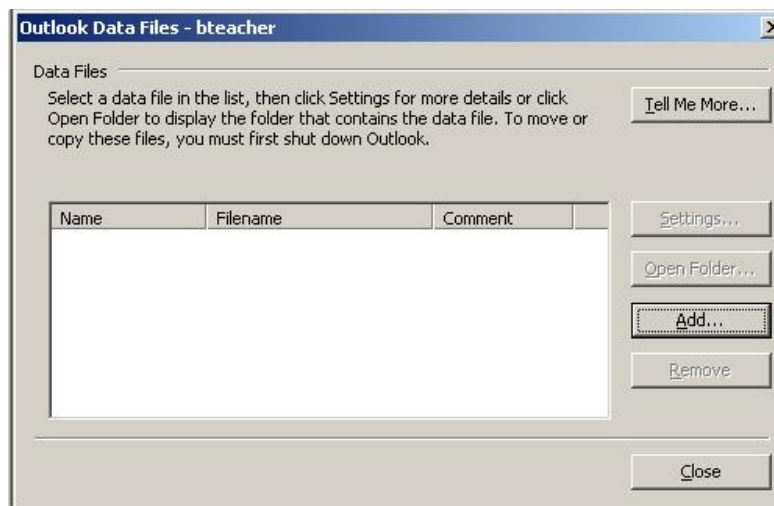
New Personal Folder

If this is a new Personal Folder, select Office *Outlook Personal Folders File (.pst)*. Click OK. Choose the location where you want the Personal Folder stored and the name of the PST. Click OK. You can now name your Personal Folder and/or password protect it. Click OK. Use the screenshots below as a guide.

Configure an existing Personal Folder

If you need to point to a previous **Outlook 2003** Personal Folder, select *Office Outlook Personal Folder File (.pst)*. If you need to point to a previous Personal Folder that was created/used in a version of Outlook prior to Outlook 2003, select *Outlook 97-2002 Personal Folders File (.pst)*. Click OK.
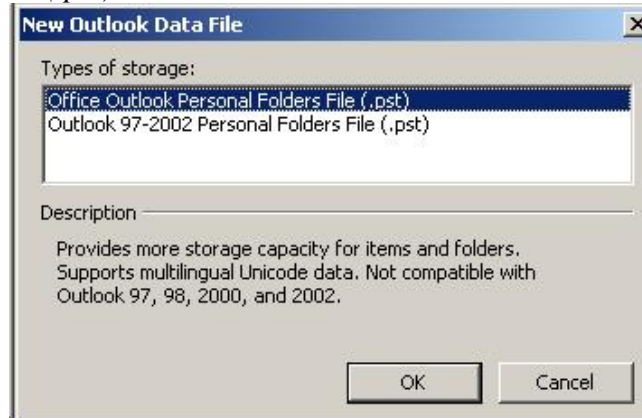
Choose the location where the existing Personal Folder is located and click OK.
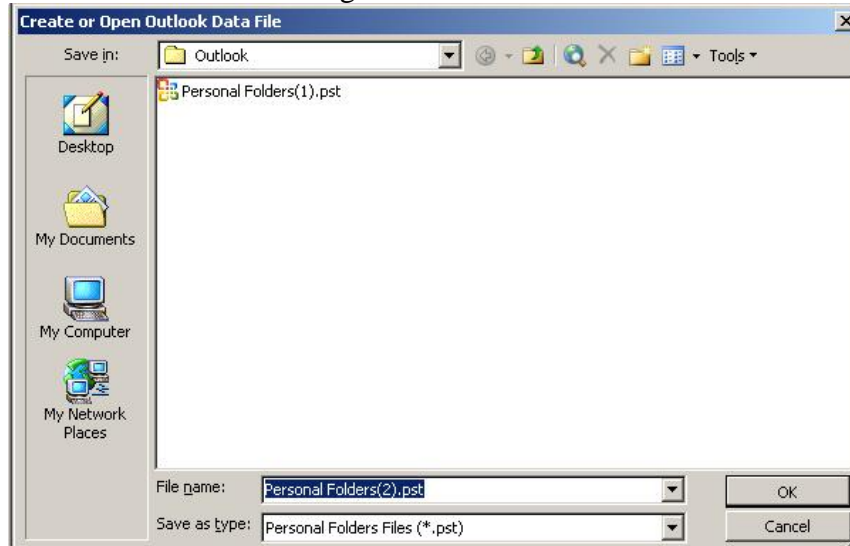
You can now name your Personal Folder and/or password protect it. Click OK.

You can now name your Personal Folder and/or password protect it. Click OK.

Note: Outlook 2003's Personal Folder can grow to more than 20GBs. All versions prior to Outlook 2003 have a Personal Folder file size limit of 2GB.
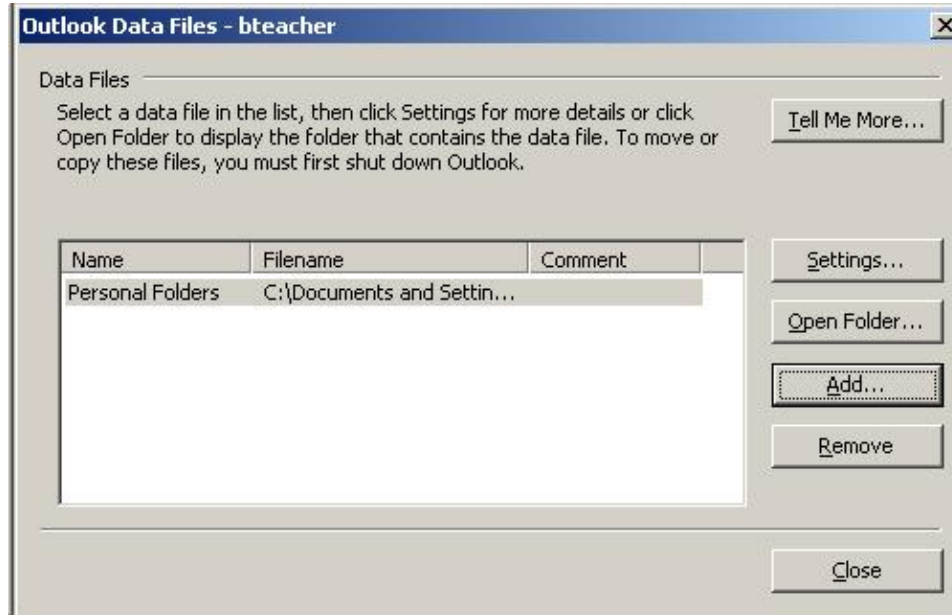
Click Close, Close, and Okay.

You should now be able to access your e-mail with this profile.
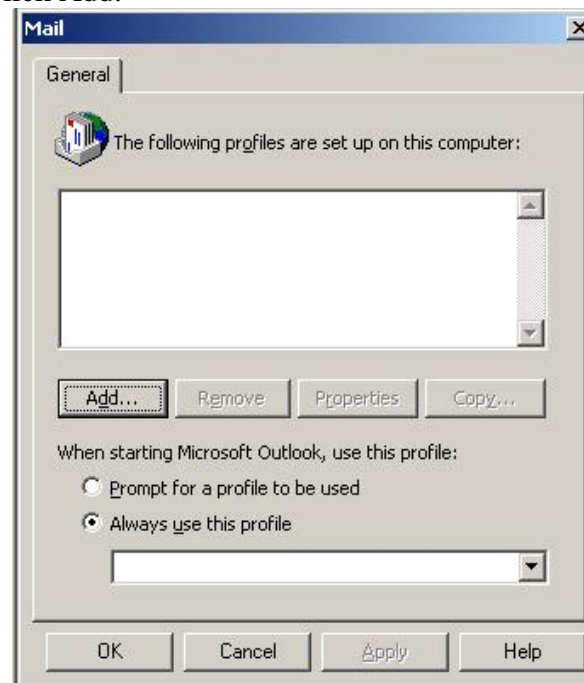
Outlook 2002 (Outlook XP)

Profile Creation

If there are profiles already present, the following screen will be displayed. Click the *Show Profiles* button.

If there are Profiles present on the machine, you will need to *Remove* each and *Add* them back, pointing them to the new Exchange 2003 server. Use the instructions below.

On the Mail screen, click Add.

In the New Profile window, enter a Profile Name and click OK.

In the E-mail Accounts window, assure *Add a new e-mail account* is checked and click Next.
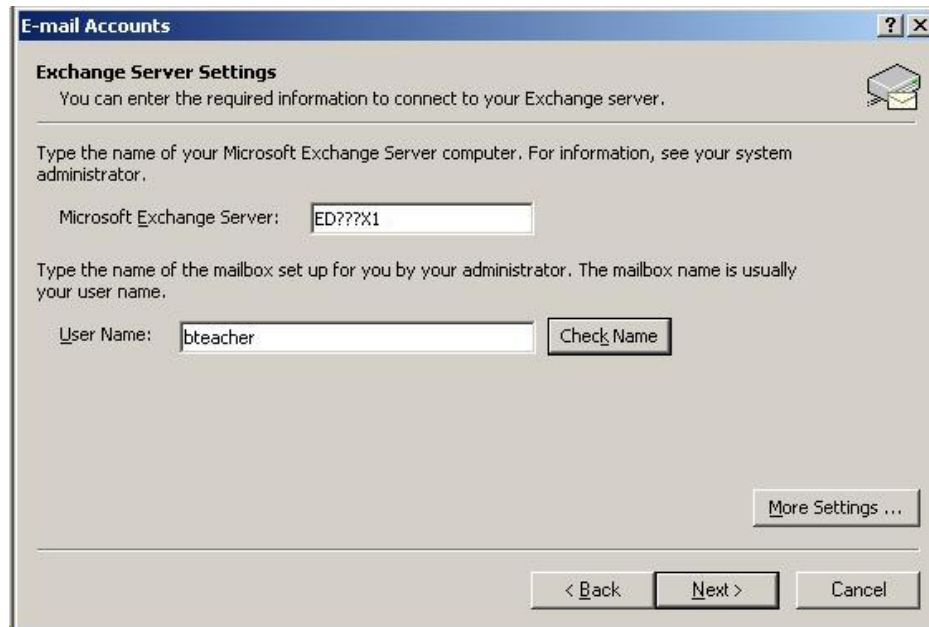
Under Server Type, select *Microsoft Exchange Server* and click Next.

Type the name of the district's Exchange 2003 Server in the *Microsoft Exchange Server* field. The naming standard is **ED*???*X1**, where *???* is the district number (Ex. ED571X1 for Warren County). A list of all district Exchange 2003 Server names can be found in Appendix A of this document. In the *User Name* field, type the Active Directory login of the person for whom you will be creating the profile.

Once this is done, click Check Name. If it resolves, it will underline both the Exchange Server name and the username.

After the names resolve (both Server Name and User Name become underlined), click Next.

Click Finish.

The user should now be able to access their e-mail with this profile. If the user requires Personal Folders (PSTs), refer to the **Personal Folders in Outlook 2002** section below. If you have multiple profiles on this machine, and need further assistance in setting them up, please contact the KETS Help Desk for assistance.

The user should now be able to access their e-mail with this profile. If the user does not have a need for a Personal Folder, Click OK to close.
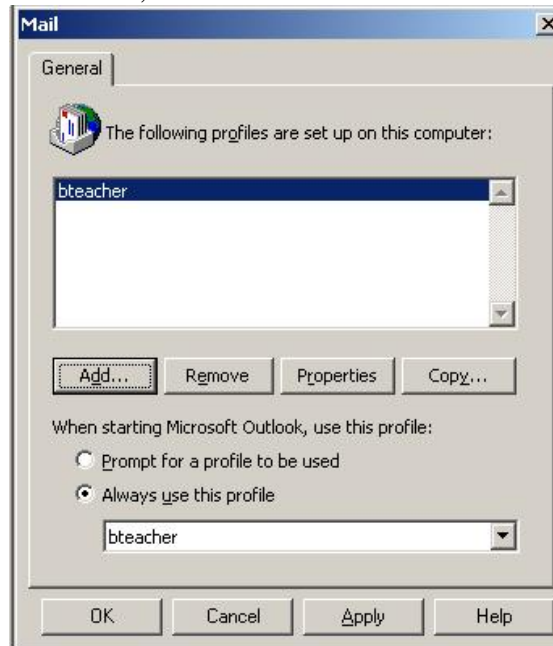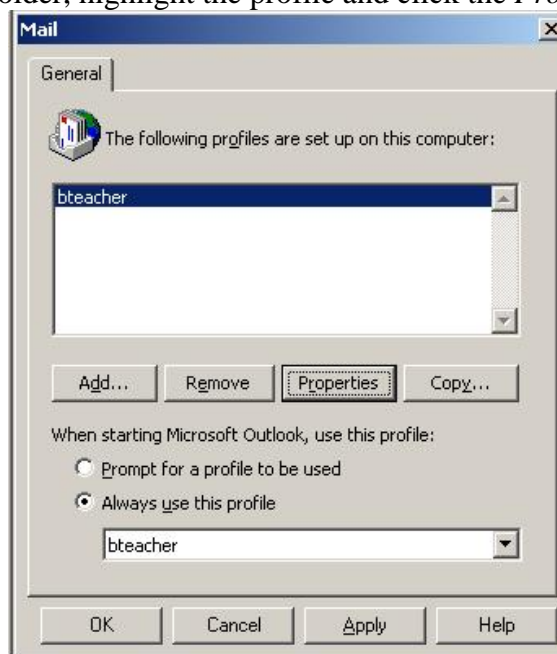

Otherwise, refer to the **Personal Folders in Outlook 2002** section below. If you have multiple profiles on this machine, and need further assistance, please contact the KETS Help Desk.

Personal Folders in Outlook 2002

To set up a Personal Folder, highlight the profile and click the *Properties* button.

Click the *Data Files* button.
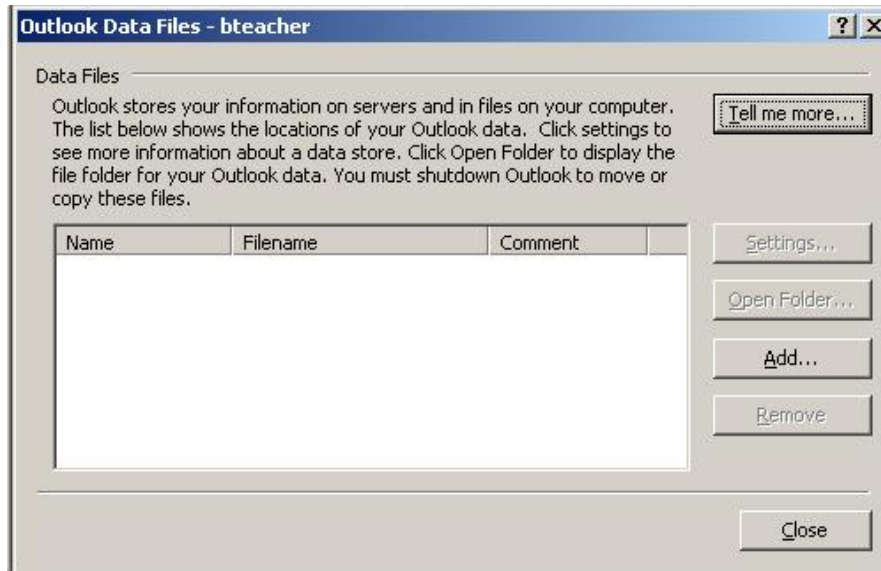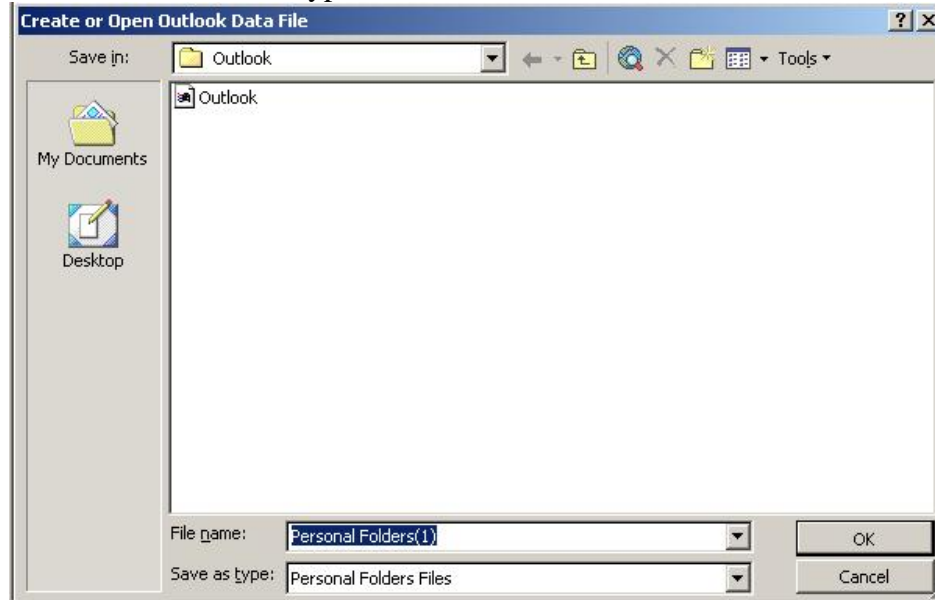
Click *Add*.

Click OK.

On the *Create or Open Outlook Data File* screen, either choose an existing PST if one already existed for the user, or type a file name for the new Personal Folder. Click *OK*.

If you would like to set encryption or password protection, do so on this screen. Click OK.

Click Close, Close and OK.

The user should now be able to access their e-mail with this profile.

Outlook 2000 SP2

<u>Profile Creation</u>

If there is a profile already present, you will need to delete it first. Click the *Show Profiles* button

Highlight the profile and click *Remove*.

Click *Add.*

Select *Microsoft Exchange Server* and click *Next*

Type the name of the district's Exchange 2003 Server in the *Microsoft Exchange Server* field. The naming standard is **ED*???*X1**, where *???* is the district number (Ex. ED152X1 for Elizabethtown). A list of all district Exchange 2003 server names can be found in Appendix A of this document. In the *Mailbox* field, type the Active Directory username of the person for whom you will be creating the profile. Once completed, click Next.

If you have a laptop and will ever need to check your e-mail when not connected to the network, select *Yes*. If you will only use this client while connected to the district network, hence you are connected to the Exchange Server, select *No*. Click Next.
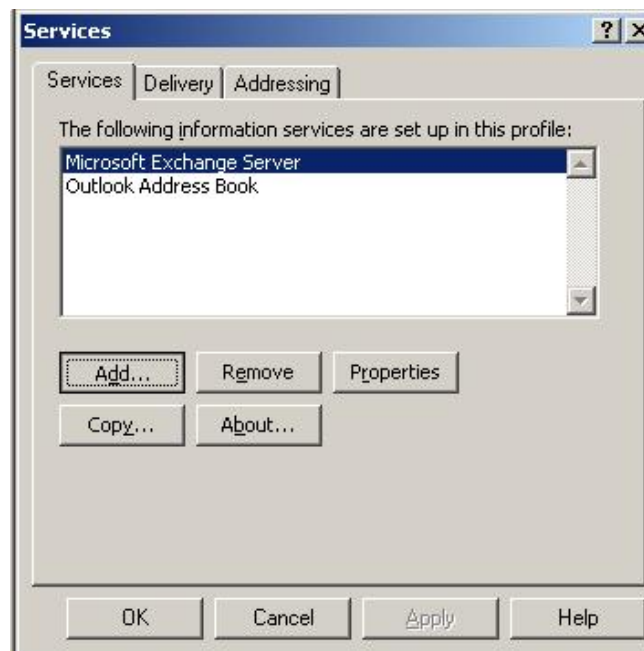
Click Finish and Close.

You should now be able to access your e-mail with this profile.

Personal Folders in Outlook 2000 SP2

To create or open a Personal Folder, from within Outlook, click Tools > Services from the File menu. Click Add.
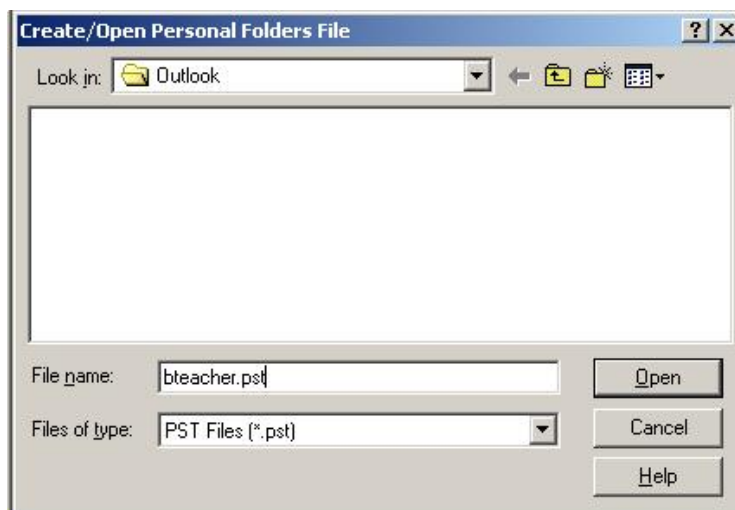
Scroll down and highlight *Personal Folders* and click OK.

Select an existing file to open, or type a new filename and click Open.

If you would like to set encryption or password protection, do so on this screen. Click OK.

The user should now be able to access their Personal Folder.

Microsoft Entourage 2004 for Macintosh

<u>**Profile Creation**</u>

Open the Entourage Client. If a shortcut icon is not present in the toolbar, the default install directory is Hard Drive/Applications/Microsoft Office x/Entourage.
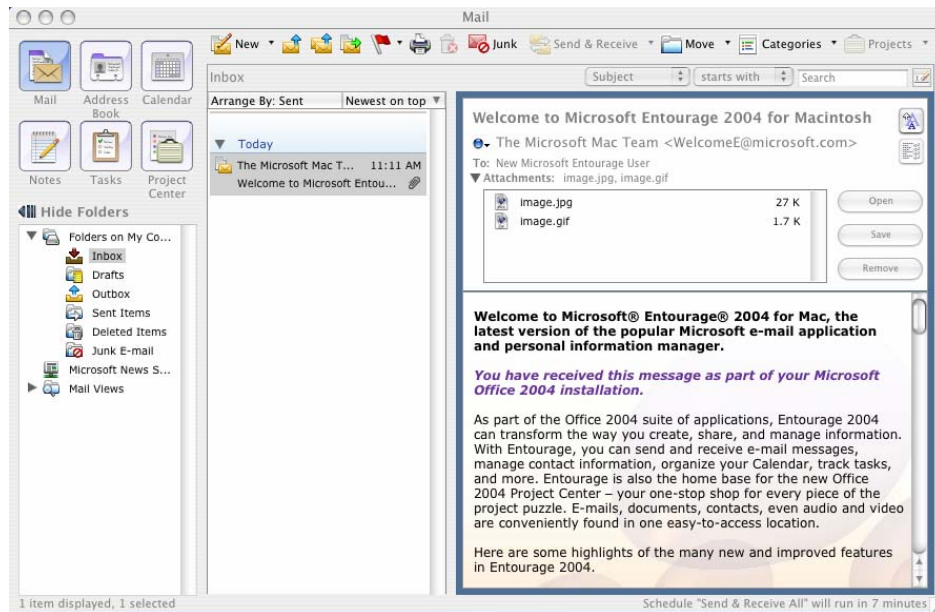
Click on the Tools in the top toolbar and go to Accounts. This will open the Accounts configuration box.
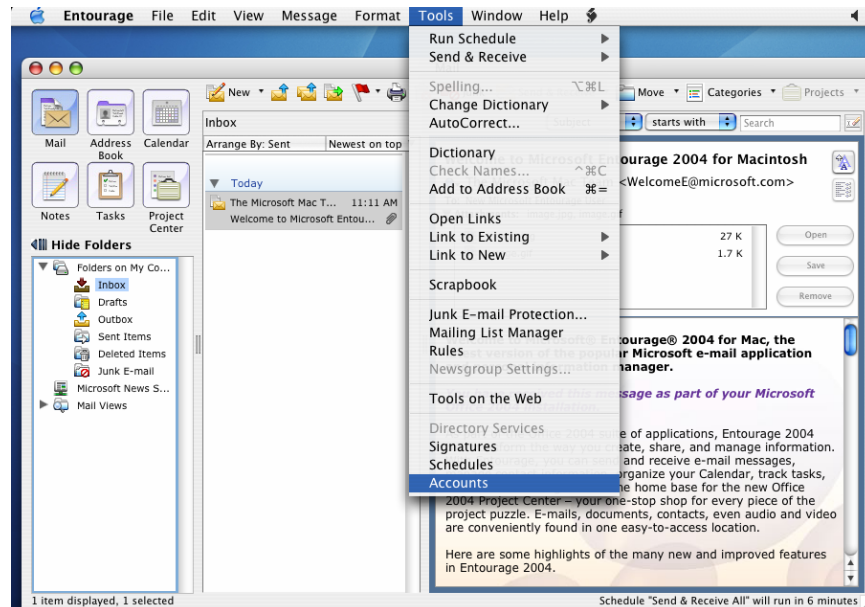
Click the Exchange tab. Click new and this will open the Account Setup Assistant.
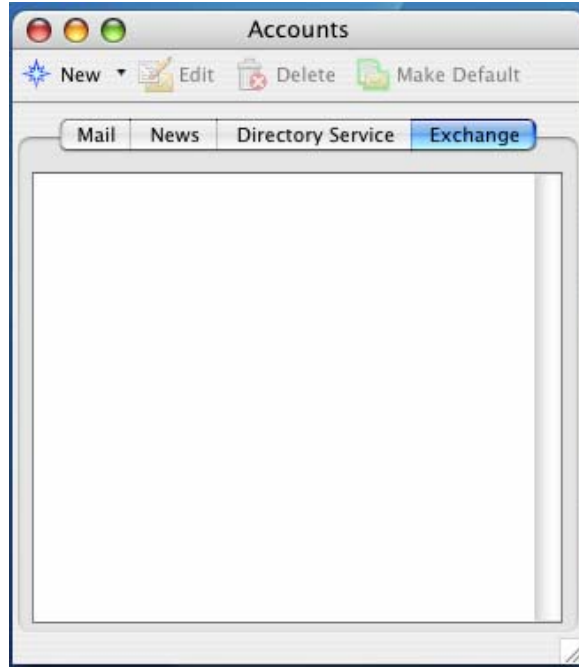
Click the Configure account manually button.
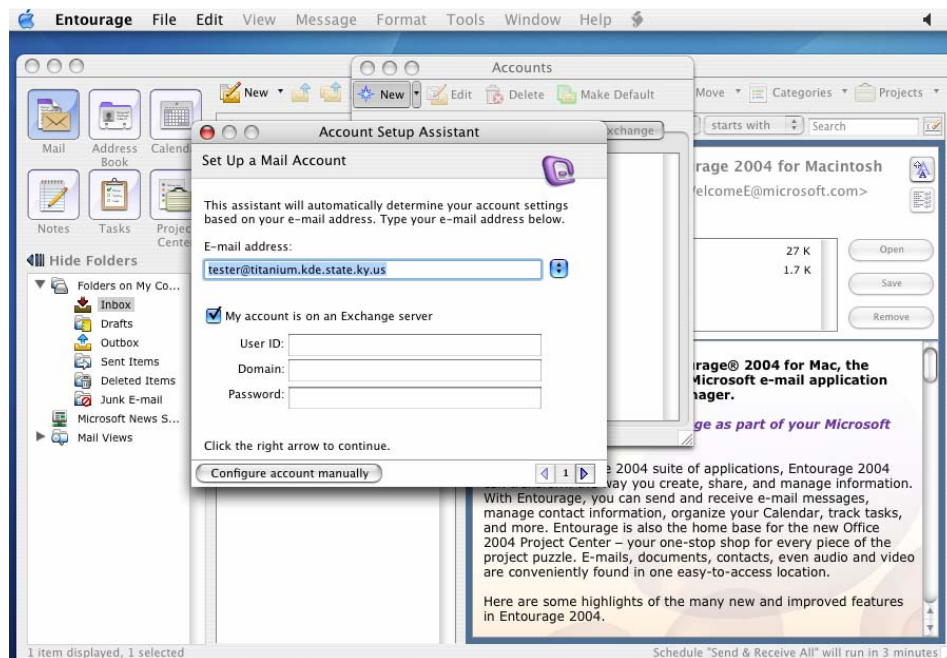
Input the proper account name and designated user information (Account ID will be the login for the user). The password can be filled in and saved in the keychain. This will automate user login upon opening the program (** This can be a security risk for the user**). Un-checking this box will prompt the user to login each time the client is opened. Input the proper local domain and Exchange 2003 server, (i.e., Adair & ED001X1.adair.ketsds.net). A list of all district Exchange 2003 Server names can be found in Appendix A of this document.
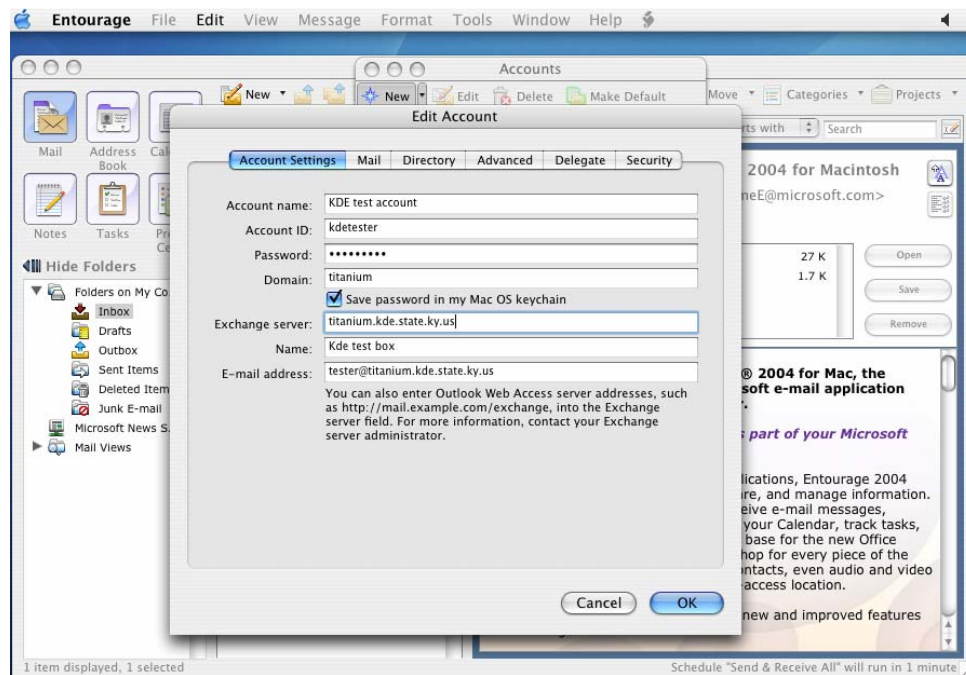
Click on the Directory tab and input the local Active Directory Global Catalog server for the LDAP server (EDxxx000G1, where "xxx" is the district number), i.e. ED001000G1.adair.ketsds.net
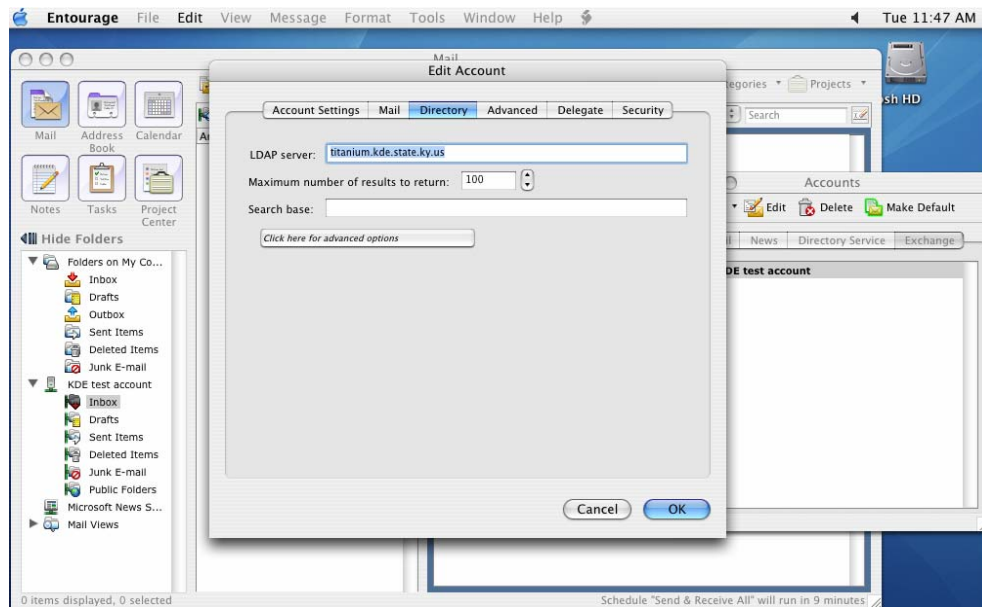
Input the local Exchange 2003 server for the Public folders server. (i.e., ED001X1.adair.ketsds.net).
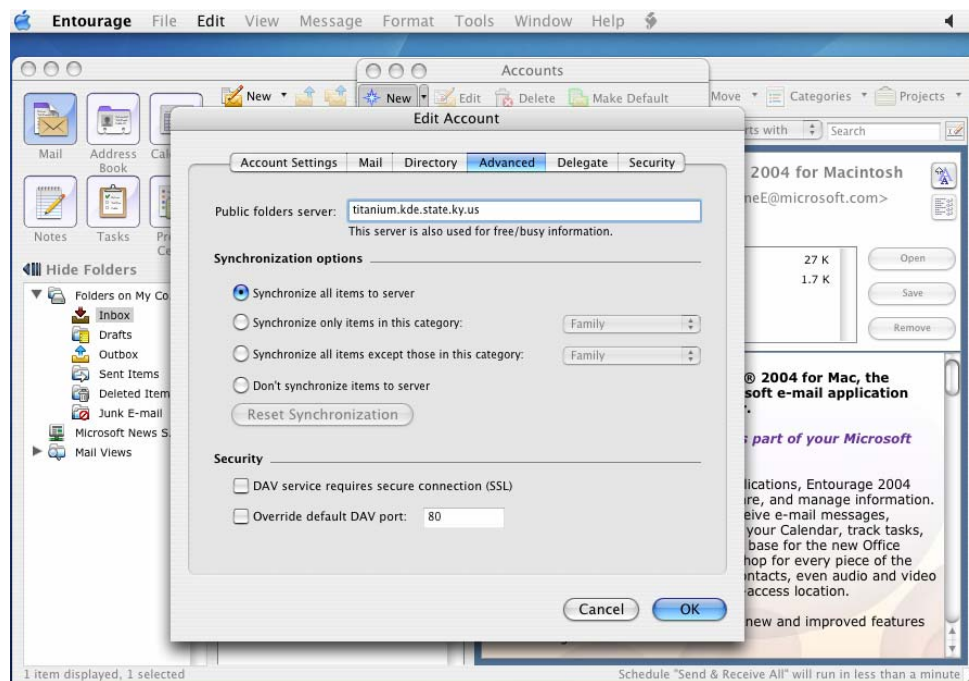
Click the OK button.   The user should now be able to access their email using this client.

For more information on configuring a Macintosh client, please use the links below.

- Microsoft's How-To Articles for Entourage
  http://www.microsoft.com/mac/products/entourage2004/using.aspx?pid=usingentourage2004

- Configuring Entourage mail accounts
  http://www.microsoft.com/mac/products/entourage2004/using.aspx?pid=usingentourage2004&type=howto&article=/mac/LIBRARY/how_to_articles/office2004/en_mailaccount.xml

Microsoft Entourage 2004 SP2 for Mac OS X

Profile Creation

Open the Entourage Client. If a shortcut icon is not present in the toolbar, the default install directory is Hard Drive/Applications/ Microsoft Office 2004/Microsoft Entourage.
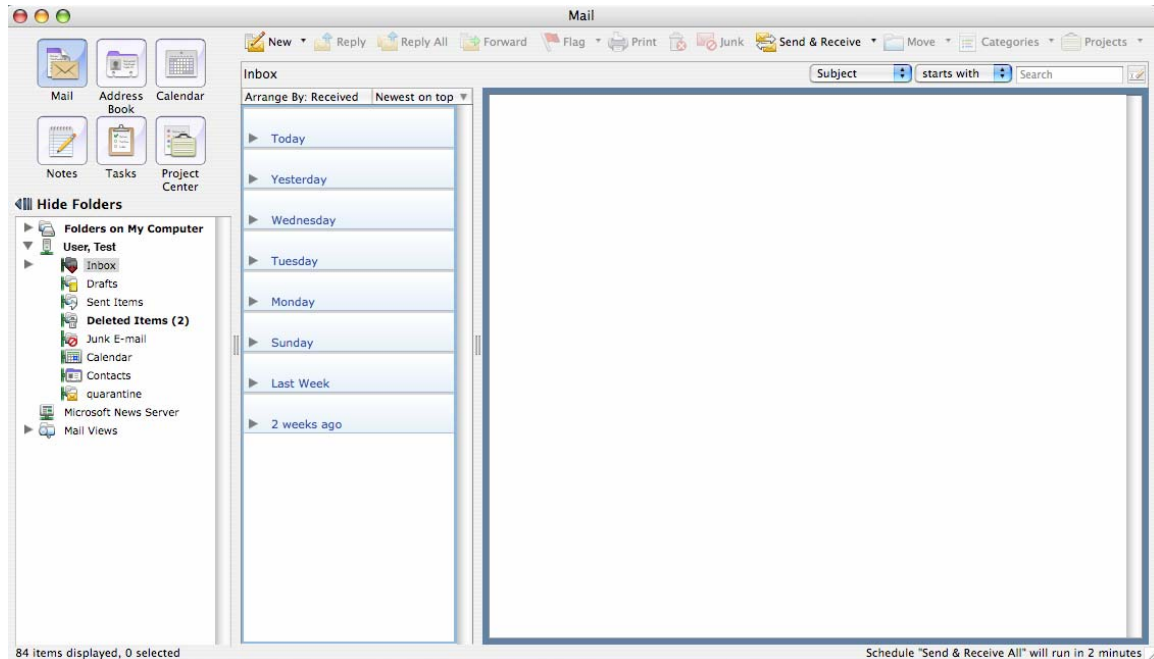

Click on the Tools in the top toolbar and go to Accounts. This will open the Accounts configuration box.
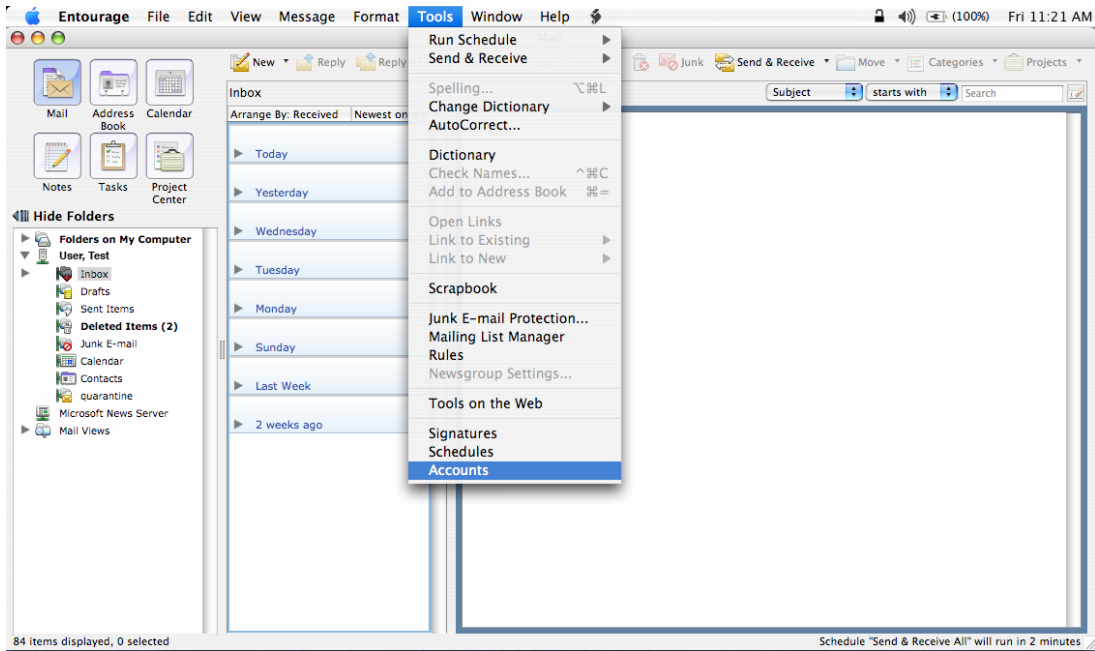
Email Client Migration

Click the Exchange tab. Click new and this will open the Account Setup Assistant.
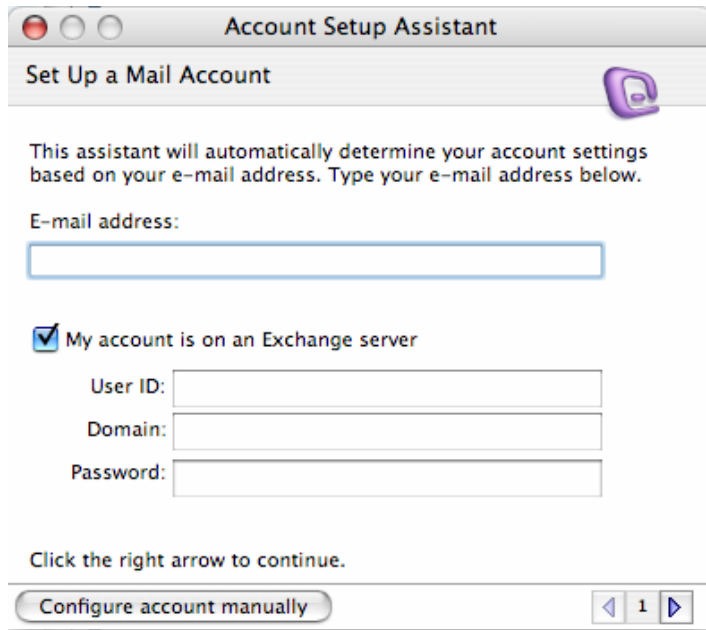
Or click the arrow next to New and select Exchange.

Click the Configure account manually button.

Input the proper account name and designated user information (Account ID will be the login for the user). The password can be filled in and saved in the **keychain. This will automate user login upon opening the program. Un-checking this box will prompt the user to login each time the client is opened. Input the proper local domain and Exchange 2003 server, (i.e., Adair & ED001X1.adair.ketsds.net). A list of all district Exchange 2003 Server names can be found in Appendix A of this document. To learn more about utilizing Web DAV in the Entourage 2004 client download and review WorkingWithExchangeServer.pdf

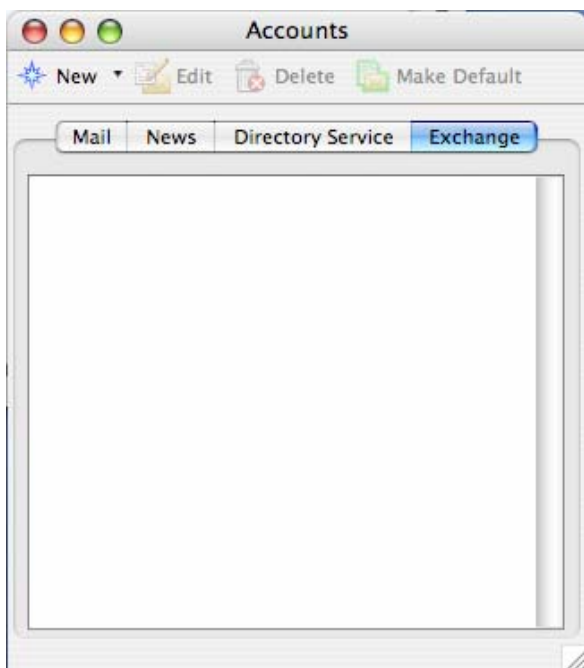** To better secure keychain access in Mac OS X go to the preference panel and select the security pane and check "Require password to unlock each secure system preference". The user via the keychain application can also lock Keychain access. Locking the keychain will require the user to unlock the keychain using their login id. If the user is in simple finder mode they will not have access to the keychain.

Input the local Exchange 2003 server for the Public folders server.

To look up users provide the proper LDAP search base.

Macintosh Outlook 2001
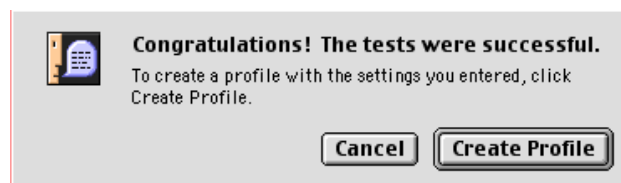
Profile Creation

When opening the client for the first time after installation, you will be prompted for a profile creation. Name the profile to match the individual for the mail client. Insert the name of the local Exchange 2003 server (i.e., ED001X1.adair.ketsds.net), and the mailbox for the user. A list of all district Exchange 2003 Server names can be found in Appendix A of this document. Click the Test Settings button.

Once the profile settings are tested against the server for valid settings you will get the following dialog box to complete the profile. Click the Create Profile button.

After the profile has been generated, you will be prompted with the login dialog box. Authenticate with the designated user using the proper domain credentials.   Once the login is accepted the mail client will open.

Welcome to Microsoft Outlook
Enter your password to log in to Microsoft Outlook.

User name: kdetester
Password: ●●●●●●●●●
Domain: titanium

☐ Add to Keychain

Cancel   Change Password   Log in
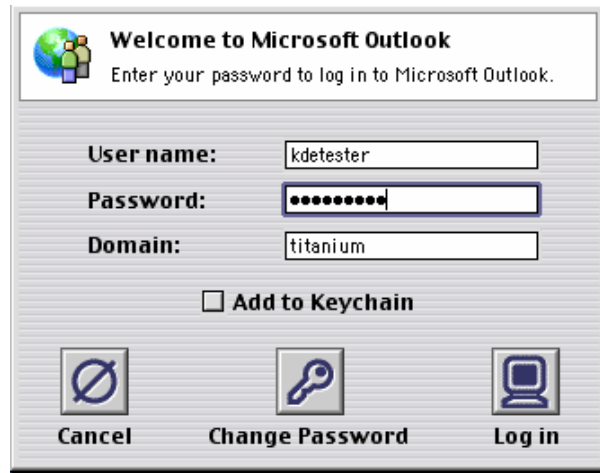
Editing an Existing Profile

Click the Apple Menu, highlight the Control Panels, and go to the Outlook Settings
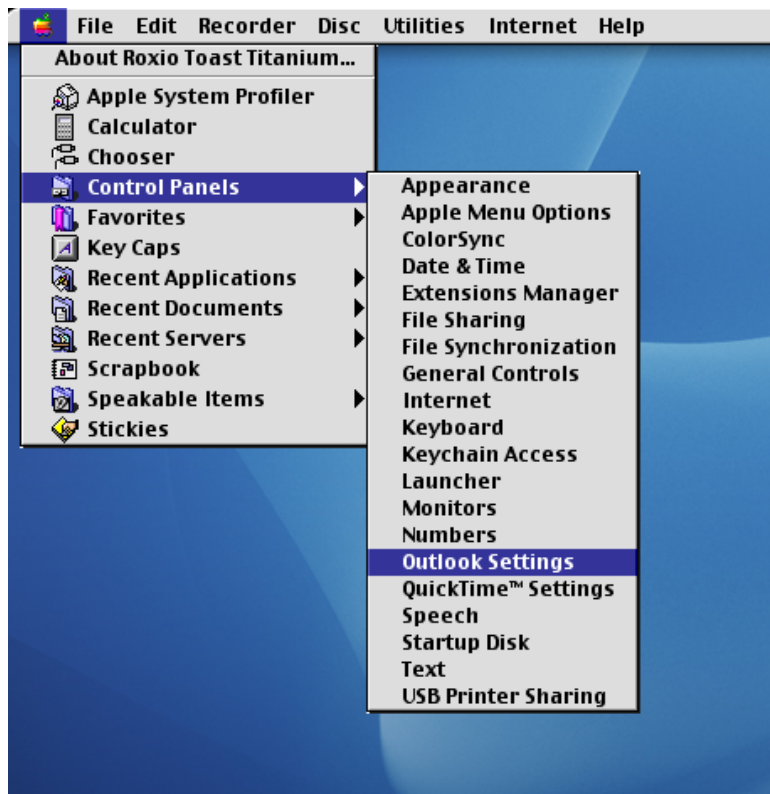
This will open the Outlook Settings.   You should see the pre-existing profile configured on the client. Highlight the Microsoft Exchange Server and click the Properties button.
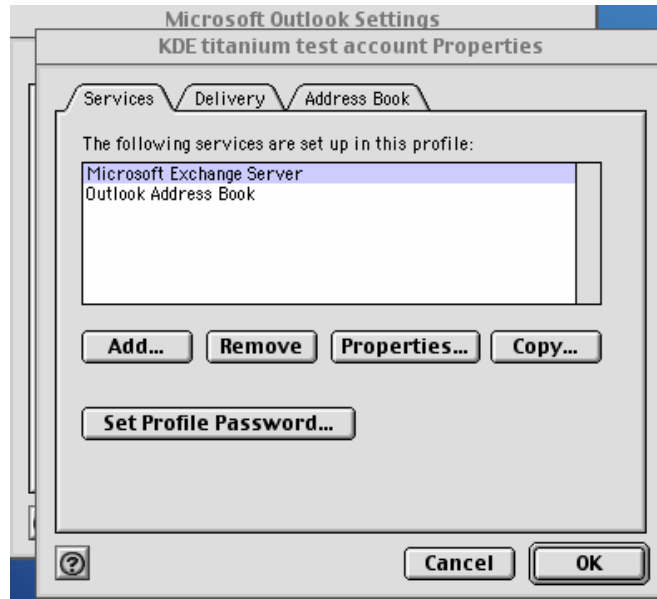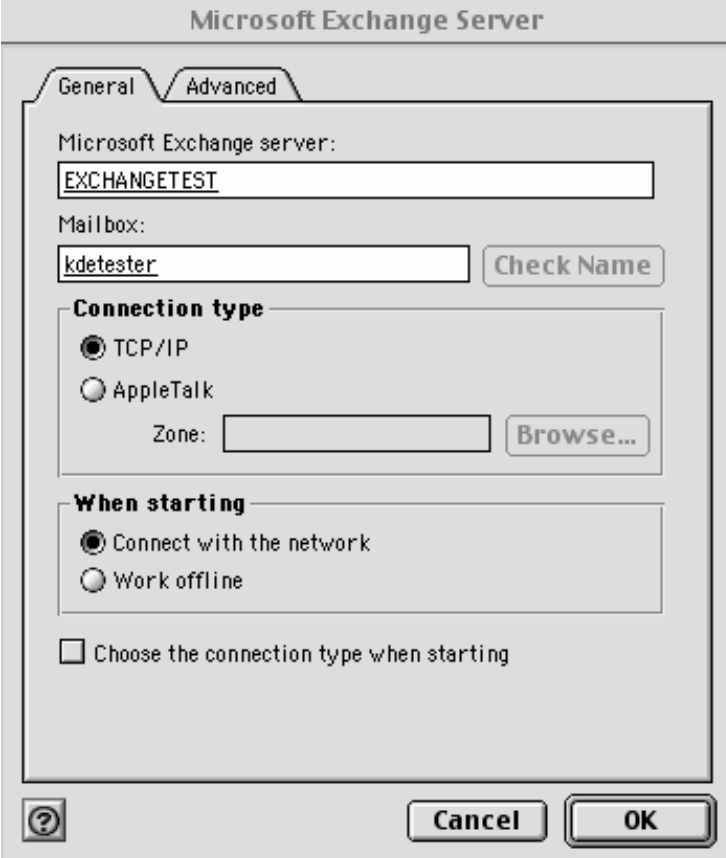
With the Microsoft Exchange Server properties dialog box open, you will be able to input the local Exchange 2003 server (i.e. ED001X1.adair.ketsds.net) and verify the proper mailbox information is correct.   A list of all district Exchange 2003 Server names can be found in Appendix A of this document. Click the Check Name button.
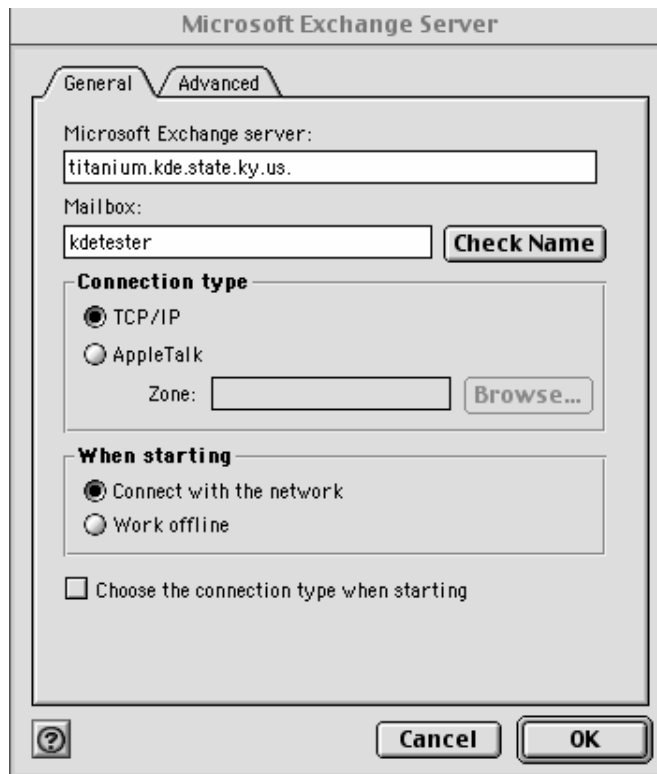
You will be prompted with a login dialog box. Enter the proper authentication for the account. The server name and mailbox name will become underlined, indicating the server and a valid account has been resolved.

Click OK. Click OK again to close the Outlook Settings Window. The mail client is now configured for the Exchange 2003 server. Open the mail client and authenticate with the proper credentials.

Personal Folders in Macintosh Outlook 2001 client

Open the Outlook 2001 client. On the toolbar click Edit and selcet Preferences.
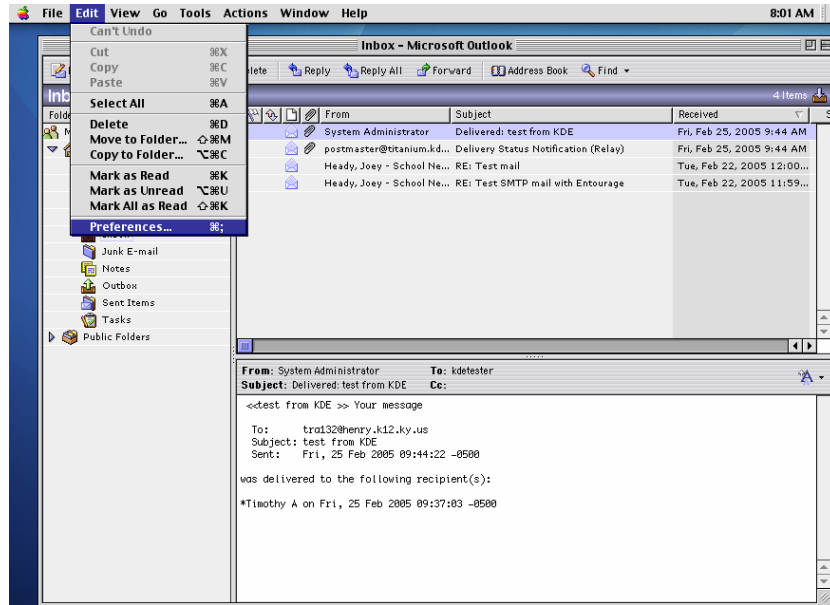
Under Mail, highlight Services and the click the Add button on right side.
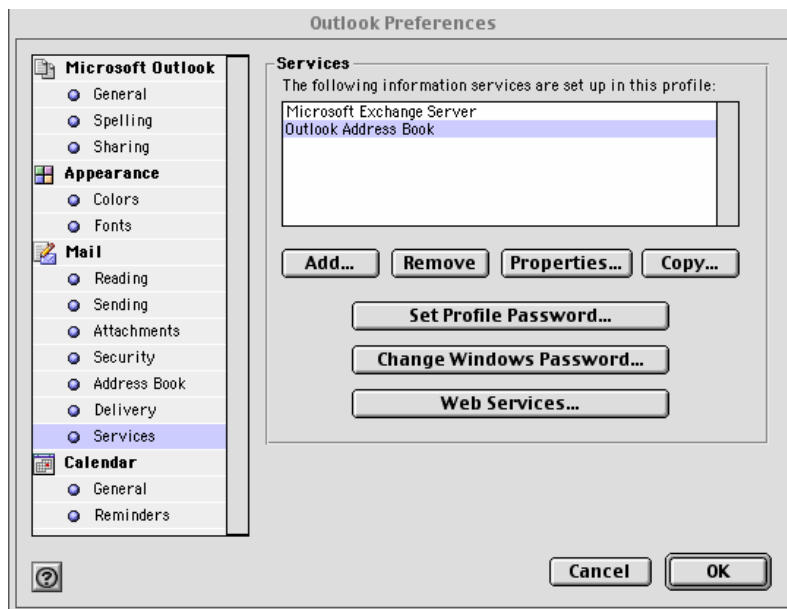
When the dialog box opens, select Personal Folders and click the Add button.

Email Client Migration
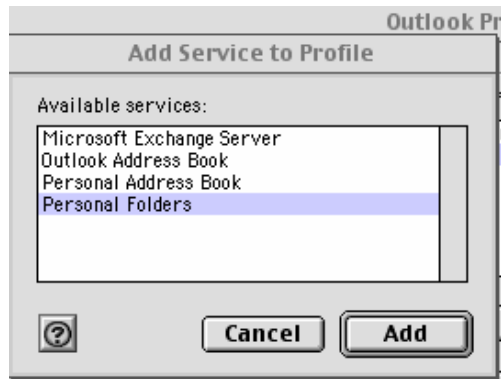
You have the option of choosing a pre-existing PST file or click the New button.
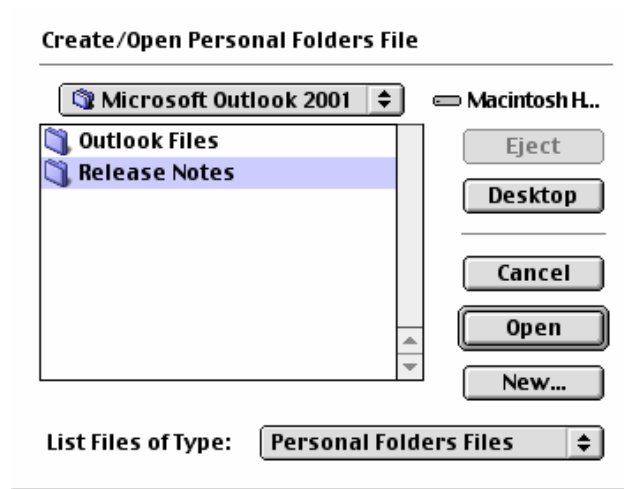
Creating a new PST file – name file or leave as default Personal Folders, click Save.
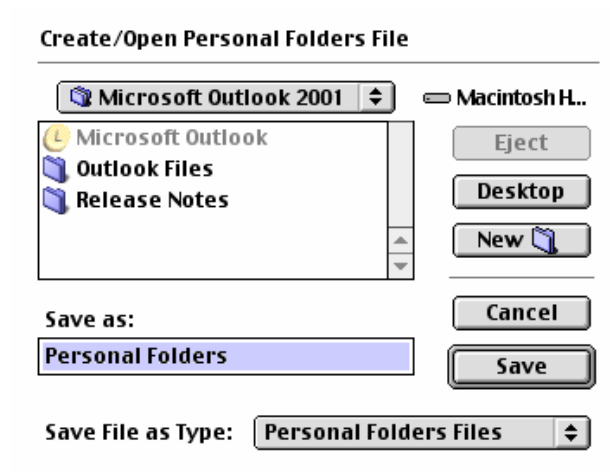
You can rename the PST file name or take the default. Click OK button.

Verify the Personal Folders are listed under the Services. Click the OK button.
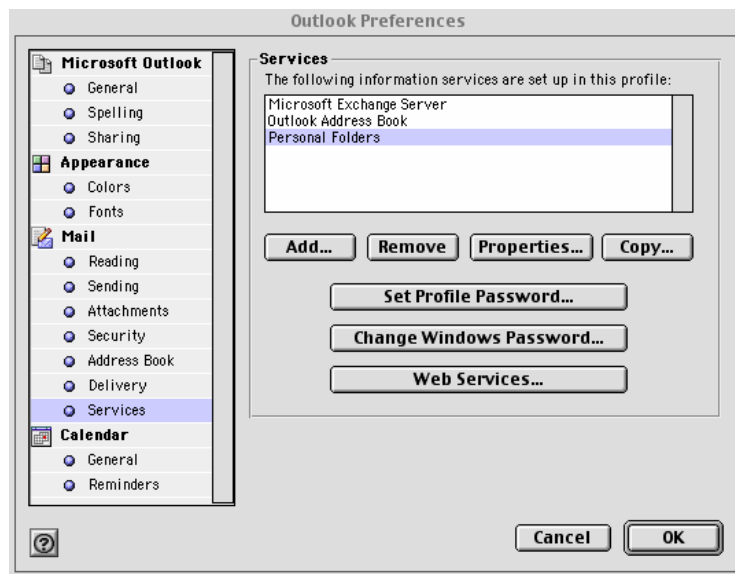
The user should now be able to access their Personal Folder.

Appendix A (District Exchange 2003 Server Names)

District	Dist No	Exchange 2003 Server Name
Adair County	001	ED001X1
Allen County	005	ED005X1
Anchorage Independent	006	ED006X1
Anderson County	011	ED011X1
Ashland Independent	012	ED012X1
Augusta Independent	013	ED013X1
Ballard County	015	ED015X1
Barbourville Independent	016	ED016X1
Bardstown Independent	017	ED017X1
Barren County	021	ED021X1
Bath County	025	ED025X1
Beechwood Independent	026	ED026X1
Bell County	031	ED031X1
Bellevue Independent	032	ED032X1
Berea Independent	034	ED034X1
Boone County	035	ED035X1
Bourbon County	041	ED041X1
Bowling Green Independent	042	ED042X1
Boyd County	045	ED045X1
Boyle County	051	ED051X1
Bracken County	055	ED055X1
Breathitt County	061	ED061X1
Breckinridge County	065	ED065X1
Bullitt County	071	ED071X1
Burgin Independent	072	ED072X1
Butler County	075	ED075X1
Caldwell County	081	ED081X1
Calloway County	085	ED085X1
Campbell County	091	ED091X1
Campbellsville Independen	092	ED092X1
Carlisle County	095	ED095X1
Carroll County	101	ED101X1
Carter County	105	ED105X1
Casey County	111	ED111X1
Caverna Independent	113	ED113X1
Christian County	115	ED115X1
Clark County	121	ED121X1
Clay County	125	ED125X1
Clinton County	131	ED131X1
Cloverport Independent	132	ED132X1
Corbin Independent	133	ED133X1
Covington Independent	134	ED134X1
Crittenden County	135	ED135X1
Cumberland County	141	ED141X1
Danville Independent	143	ED143X1

District	Dist No	Exchange 2003 Server Name
Daviess County	145	ED145X1
Dawson Springs Independen	146	ED146X1
Dayton Independent	147	ED147X1
East Bernstadt Independen	149	ED149X1
Edmonson County	151	ED151X1
Elizabethtown Independent	152	ED152X1
Elliott County	155	ED155X1
Eminence Independent	156	ED156X1
Erlanger-Elsmere Independ	157	ED157X1
Estill County	161	ED161X1
Fairview Independent	162	ED162X1
Fayette County	165	ED165X1
Fleming County	171	ED171X1
Floyd County	175	ED175X1
Fort Thomas Independent	176	ED176X1
Frankfort Independent	177	ED177X1
Franklin County	181	ED181X1
Fulton County	185	ED185X1
Fulton Independent	186	ED186X1
Gallatin County	191	ED191X1
Garrard County	195	ED195X1
Glasgow Independent	197	ED197X1
Grant County	201	ED201X1
Graves County	205	ED205X1
Grayson County	211	ED211X1
Green County	215	ED215X1
Greenup County	221	ED221X1
Hancock County	225	ED225X1
Hardin County	231	ED231X1
Harlan County	235	ED235X1
Harlan Independent	236	ED236X1
Harrison County	241	ED241X1
Harrodsburg Independent	242	ED242X1
Hart County	245	ED245X1
Hazard Independent	246	ED246X1
Henderson County	251	ED251X1
Henry County	255	ED255X1
Hickman County	261	ED261X1
Hopkins County	265	ED265X1
Jackson County	271	ED271X1
Jackson Independent	272	ED272X1
Jefferson County	275	ED275X1
Jenkins Independent	276	ED276X1
Jessamine County	281	ED281X1
Johnson County	285	ED285X1
KDE	999	ED999X1
Kenton County	291	ED291X1
Kentucky School for the Blind	602	ED602X1
Kentucky School for the Deaf	603	ED603X1

Email Client Migration

District	Dist No	Exchange 2003 Server Name
Knott County	295	ED295X1
Knox County	301	ED301X1
LaRue County	305	ED305X1
Laurel County	311	ED311X1
Lawrence County	315	ED315X1
Lee County	321	ED321X1
Leslie County	325	ED325X1
Letcher County	331	ED331X1
Lewis County	335	ED335X1
Lincoln County	341	ED341X1
Livingston County	345	ED345X1
Logan County	351	ED351X1
Ludlow Independent	354	ED354X1
Lyon County	361	ED361X1
Madison County	365	ED365X1
Magoffin County	371	ED371X1
Marion County	375	ED375X1
Marshall County	381	ED381X1
Martin County	385	ED385X1
Mason County	391	ED391X1
Mayfield Independent	392	ED392X1
McCracken County	395	ED395X1
McCreary County	401	ED401X1
McLean County	405	ED405X1
Meade County	411	ED411X1
Menifee County	415	ED415X1
Mercer County	421	ED421X1
Metcalfe County	425	ED425X1
Middlesboro Independent	426	ED426X1
Monroe County	431	ED431X1
Montgomery County	435	ED435X1
Monticello Independent	436	ED436X1
Morgan County	441	ED441X1
Muhlenberg County	445	ED445X1
Murray Independent	446	ED446X1
Nelson County	451	ED451X1
Newport Independent	452	ED452X1
Nicholas County	455	ED455X1
Ohio County	461	ED461X1
Oldham County	465	ED465X1
Owen County	471	ED471X1
Owensboro Independent	472	ED472X1
Owsley County	475	ED475X1
Paducah Independent	476	ED476X1
Paintsville Independent	477	ED477X1
Paris Independent	478	ED478X1
Pendleton County	481	ED481X1
Perry County	485	ED485X1
Pike County	491	ED491X1

District	Dist No	Exchange 2003 Server Name
Pikeville Independent	492	ED492X1
Pineville Independent	493	ED493X1
Powell County	495	ED495X1
Providence Independent	496	ED496X1
Pulaski County	501	ED501X1
Raceland Independent	502	ED502X1
Robertson County	505	ED505X1
Rockcastle County	511	ED511X1
Rowan County	515	ED515X1
Russell County	521	ED521X1
Russell Independent	522	ED522X1
Russellville Independent	523	ED523X1
Science Hill Independent	524	ED524X1
Scott County	525	ED525X1
Shelby County	531	ED531X1
Silver Grove Independent	533	ED533X1
Simpson County	535	ED535X1
Somerset Independent	536	ED536X1
Southgate Independent	537	ED537X1
Spencer County	541	ED541X1
Taylor County	545	ED545X1
Todd County	551	ED551X1
Trigg County	555	ED555X1
Trimble County	561	ED561X1
Union County	565	ED565X1
Walton Verona Independent	567	ED567X1
Warren County	571	ED571X1
Washington County	575	ED575X1
Wayne County	581	ED581X1
Webster County	585	ED585X1
West Point Independent	586	ED586X1
Whitley County	591	ED591X1
Williamsburg Independent	592	ED592X1
Williamstown Independent	593	ED593X1
Wolfe County	595	ED595X1
Woodford County	601	ED601X1

Appendix B (Cached Exchange Mode Information)

For those districts that have or are planning on implementing Outlook 2003, a good understanding of Cache-mode is in order to properly equip each client for the desired messaging experience. When Cache-mode is set on a profile, a copy of all mailbox content is downloaded to the client machine. This is very similar to offline mode in legacy Outlook clients, which was often used on laptops for users that needed access to their messaging content when not connected to the network. An OST file was utilized to store a copy off all messages, calendar items, etc. for that person to access when not connected to the server. Sent items would 'cache' in the Outbox folder, and would be sent once the client was reconnected to the network/Exchange Server. New messages would then be downloaded to the client.

The Cache-mode functionality in Outlook 2003 is very similar to this, except the client is in 'Offline' mode all the time. At specified intervals, the client connects to the server to Send/Receive new messages. This could be useful for those clients, such as a Superintendent, that you do not want completely down if connection to the Exchange Server is lost. Of course, there are cons to this as well, as the client machine must have adequate space to store the messages in the OST. Also, it will generate more network traffic compared to non Cache-mode, as every message that is sent must also come back to the client to be stored in the Sent Items folder. Realize there is latency involved in receiving/sending messages, even when there is connection to the network and Exchange Server. If the interval for Send/Receive is 5 minutes, it could take up to that long for the client to receive those messages after the server has received them. Likewise, sent messages will reside in the Outbox of the client until the interval is reached and the client sends the messages to the server. The Offline Address Book (OAB) is also utilized instead of Global Address Lists. The clients are always using the OAB, so at certain times they may not see new objects in their Global Address List though other users in the district can see the new users/groups.

This information is given so the district can make the best judgment on whether Cache-mode (which is the default) is used for some users, or at all. If Cache-mode is deselected, the messages for the user will be stored only on the Exchange Server and the experience will be more 'Real-time'.

Note: KDE recommends the default setting, where Cached Exchange Mode is enabled to download all content.

For further information about Cached Exchange Mode connection settings, see http://office.microsoft.com/en-us/assistance/HP010406601033.aspx.